

---

<b>P-CARD USER MANUAL.....</b>	<b>1</b>
<b>MAINTAINING CREDIT CARDS AND PROXY VERIFIERS .....</b>	<b>1</b>
<b>INTRODUCTION .....</b>	<b>1</b>
<b>MAINTAINING CREDIT CARDS .....</b>	<b>1</b>
<b>MAINTAINING PROXY VERIFIERS .....</b>	<b>3</b>
<b>MAINTAINING CARD HOLDERS .....</b>	<b>3</b>

# P-CARD USER MANUAL

## MAINTAINING CREDIT CARDS AND PROXY VERIFIERS

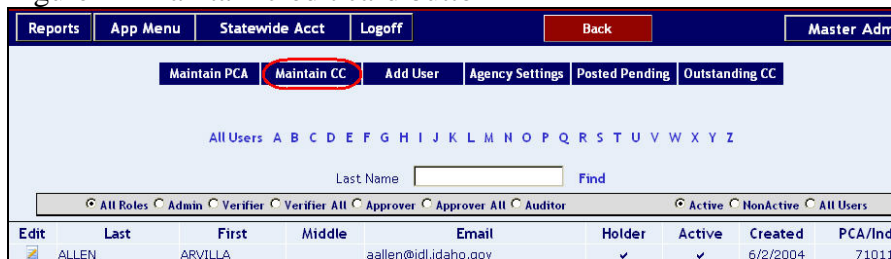
### INTRODUCTION

The **Maintain CC** screen allows you to maintain credit cards and associated card holders and proxy verifiers. You can also make changes to the card holder as you would when you edit an existing user.

### MAINTAINING CREDIT CARDS

1. Click **Maintain CC** on the Administration screen.

Figure 1 - Maintain credit card button



A list of your agency's credit cards and the associated card holder will be displayed. The list can be sorted ascending/descending by clicking the column headings (**CC#**, **Card Holder**, etc.) The column headings include:

- **CC#** – the last six digits of the P-Card.
- **Active** – Indicates if the card is active in the P-Card application.
- **Description** – A description you entered when setting up a new user.
- **Card Holder** – The name of the card holder. A card holder that is inactive in the application is indicated in red. (Missing transactions can often be attributed to users that were made inactive before the transactions were uploaded from MasterCard.) NOTE: If *both* the card and the card holder are inactive, the card holder name will not be in red.

Figure 2 - Maintain credit card screen

CC#	Active	Description	Card Holder
<a href="#">121121</a>	<input checked="" type="checkbox"/>		<a href="#">DORAN SUSAN K</a>
<a href="#">131131</a>	<input checked="" type="checkbox"/>		<a href="#">KINGHORN TRACIE</a>
<a href="#">857857</a>	<input checked="" type="checkbox"/>		<a href="#">MILLER DIANE</a>
<a href="#">867867</a>	<input checked="" type="checkbox"/>		<a href="#">JAMES ELAINE (Inactive)</a>
<a href="#">877877</a>	<input checked="" type="checkbox"/>		<a href="#">THOMPSON BILL</a>
<a href="#">730730</a>	<input checked="" type="checkbox"/>		<a href="#">LOOSLI ANGELA</a>
<a href="#">362362</a>	<input checked="" type="checkbox"/>		<a href="#">COOK PEGGY</a>

CC#  ☐ Active

Card Holder

Description

NOTE: Maintain the *credit card* by clicking the card number (**CC#**) or the *card holder* by clicking the card holder's name (**Card Holder**).

2. Click the card number in the **CC#** column to display the card details. You can perform several actions in the detail section:
  - a. To change or add a card number for a card holder, enter the new card number in the **CC#** field and then select the **Card Holder** from the drop down menu. Then enter a new **Description**.
  - b. To make a card number active or inactive, check or clear the **Active** check box.
  - c. To add a description, enter or edit the **Description** field (40 alphanumeric or special characters).

Figure 3 - Maintain CC#

CC#  ☒ Active

Card Holder

Description

Proxy Verifiers

[Del](#) KOLB JULIA

3. Click **Save** to save the changes.
- Click **Delete** to delete the card number for the card holder. However, if you delete the card, you will lose the transaction history for the card because you delete the record. If a card is lost or stolen, leave the card active in the P-Card application until all the transactions are received from Wells Fargo. After all transactions are received, make the card inactive. Do not delete the card.

## MAINTAINING PROXY VERIFIERS

You can view, add, or delete proxy verifiers of a card in the **Proxy Verifiers** section. Adding a proxy verifier means the person added can verify transactions in place of the card holder. NOTE: **Maintain CC** assigns existing P-Card users to a card whereas when you add or update an existing user to be a proxy verifier, you assign cards to the user.

Figure 4 - Proxy Verifiers section

The screenshot shows a web interface for managing proxy verifiers. At the top, there is a form for a specific card with the following fields: 'CC#' with the value '949494', a checked 'Active' checkbox, 'Card Holder' with a dropdown menu showing 'FOTSCH DAVID P', and a 'Description' text box. Below these fields are two red buttons: 'Save' and 'Delete'. Further down, there is a section titled 'Proxy Verifiers' which contains an 'Add' button next to a dropdown menu. At the bottom of this section, there is a table with one row showing a proxy verifier named 'KOLB JULIA' with a 'Del' link next to it.

1. Click the card number (CC #) to which you want to assign a proxy verifier.
2. Click the down arrow of the **Proxy Verifiers** menu and click the name to add.
3. Click **Add** to add the proxy verifier to the card.
4. To remove a proxy verifier from a card, click **Del** next to the name.

## MAINTAINING CARD HOLDERS

To edit a card holder, click the user name in the **Card Holder** column. The user's detail screen will open just as it would when you edit an existing user or add a new user. Follow the same steps to change a user's configuration as you would to set up a new user.